Installation & Setup Manual

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RollCall-Pro Version 2.05

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1. RollCall-Pro Installation

Normally this software is installed on a single PC or laptop computer that is usually situated in a board/council chamber. The RollCall-Pro System could also be setup on a network computer that is then accessed through any room with a computer that has a network connection to the central server where the program was installed. The following instructions assume a normal PC or laptop installation, but where a network install would differ, the network installation differences will be noted — the major difference being where you install the software and where you save the Results.

> **Note:** To install onto the network, you must install the CD onto the network server computer, BUT the RollCall-Pro USB SideKeys receiver must be installed on the local PC in board/council chamber in order for the keypads to work correctly.

1.1 System Requirements

Minimum system requirements to run RollCall-Pro include the following:

Pentium III Processor

Microsoft Windows 2000:
- 128 MB of RAM minimum
- Full install size: 10 MB

Microsoft Windows XP (Home or Professional) Edition:
- 128 MB of RAM minimum (256 MB recommended)
- Full install size: 10 MB

Microsoft Windows Vista Edition:
- 256 MB of RAM minimum (512 MB recommended)
- Full install size: 10 MB

CD-ROM drive and USB port

RollCall-Pro Hardware (USB SideKeys Receiver II, 3, or 4 and Keypads)

Disk space requirements for RollCall-Pro installation

The RollCall-Pro Setup installs all of its files on the drive where the Windows operating system is installed. The default directory is "C:\Program Files\RollCall-Pro\".

1.2 System Software

To install RollCall-Pro software:

1. Load the RollCall-Pro System CD into the CD-ROM of the computer.
2. The Setup program should automatically start.

3. If the Setup program does not automatically start, navigate to the Install Directory.

4. In the D:/Install Directory (assuming that "D" is the CD-ROM drive), you will see a file called "SETUP RollCall-Pro.exe". Double-click on this icon and the installation program will start and guide you through the rest of the installation. Follow the onscreen instructions.

The figure below shows the "Setup icon" file:

Figure 1-1. RollCall-Pro Setup Icon

The Welcome Screen is the first Window you will encounter after you have started the RollCall-Pro System installation.

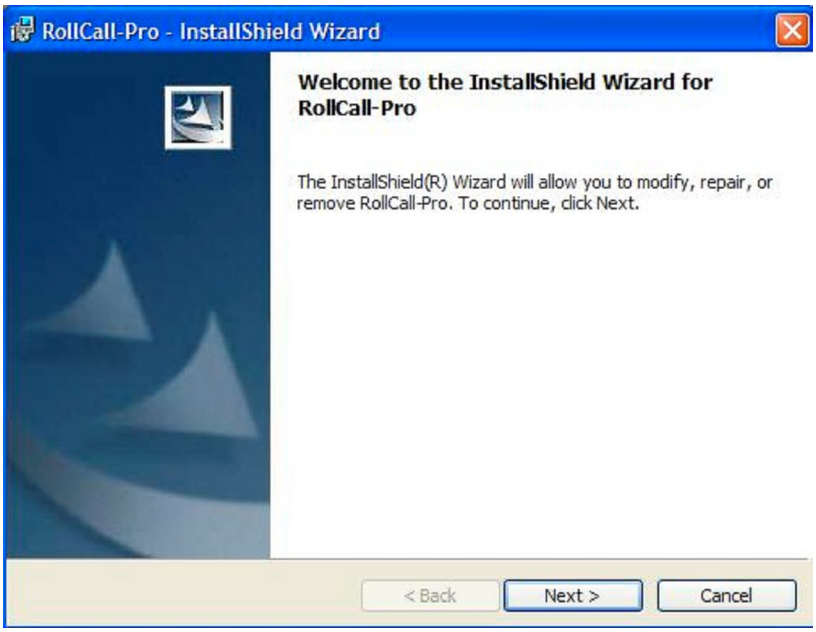

RollCall-Pro - InstallShield Wizard
Welcome to the InstallShield Wizard for RollCall-Pro
The InstallShield(R) Wizard will allow you to modify, repair, or remove RollCall-Pro. To continue, click Next.
< Back
Next >
Cancel

Figure 1-2. Welcome Screen

5. Click on "Next" to continue.

The next screen in the RollCall-Pro Systems Software installation is the Software License Agreement.

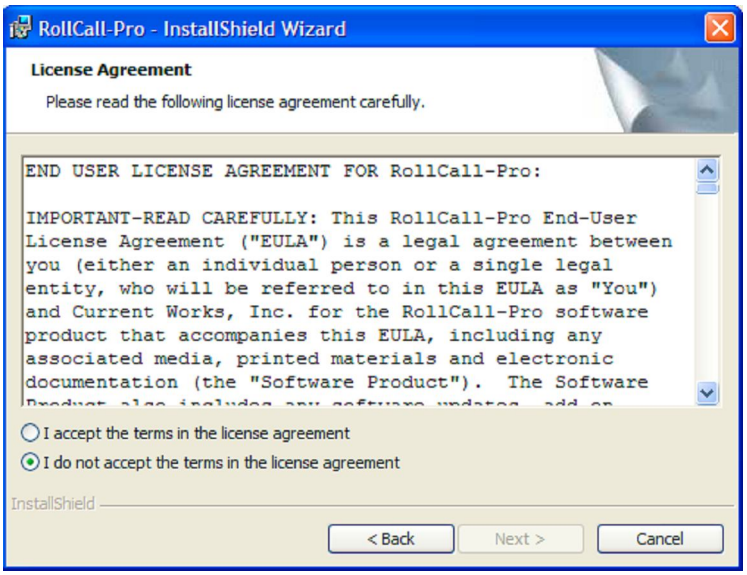

RollCall-Pro - InstallShield Wizard
License Agreement
Please read the following license agreement carefully.
END USER LICENSE AGREEMENT FOR RollCall-Pro:
IMPORTANT-READ CAREFULLY: This RollCall-Pro End-User License Agreement ("EULA") is a legal agreement between you (either an individual person or a single legal entity, who will be referred to in this EULA as "You") and Current Works, Inc. for the RollCall-Pro software product that accompanies this EULA, including any associated media, printed materials and electronic documentation (the "Software Product"). The Software
I accept the terms in the license agreement
I do not accept the terms in the license agreement
InstallShield
< Back
Next >
Cancel

Figure 1-3. Software License Agreement

6. Carefully read this agreement and when you are finished reading and willing to accept the agreement, click on the "I accept….." button and then the "Next" button to continue.

The next screen is a "Read Me" file of information about this latest version of the software.

This contains useful information about the system requirements, customer notes and planned upgrades of this RollCall-Pro software program.

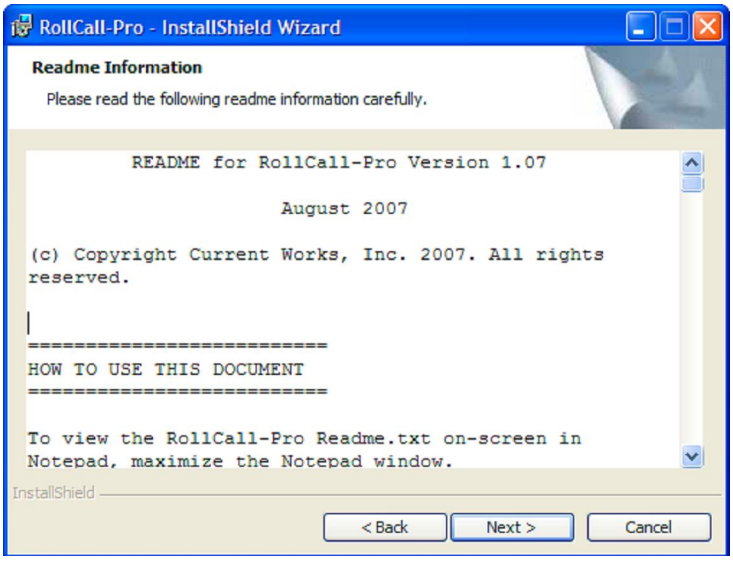

RollCall-Pro - InstallShield Wizard
Readme Information
Please read the following readme information carefully.
README for RollCall-Pro Version 1.07
August 2007
(c) Copyright Current Works, Inc. 2007. All rights reserved.
==========
HOW TO USE THIS DOCUMENT
==========
To view the RollCall-Pro Readme.txt on-screen in Notepad, maximize the Notepad window.
InstallShield
< Back
Next >
Cancel

Figure 1-4. Read Me File

Click “Next” to continue with the Installation.

The next screen to display is the User Information Screen

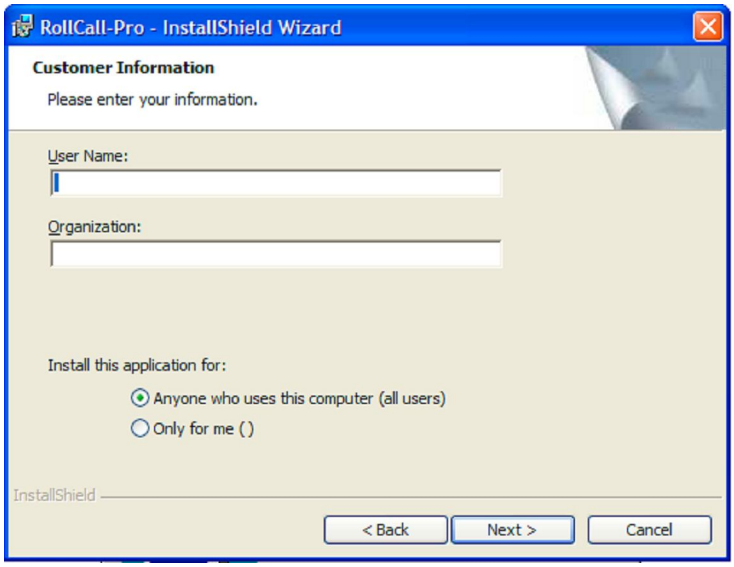


Figure 1-5. User Information

7. Enter your Name and your Company or Organization and choose “Anyone” or “Only for me”.

8. Click on “Next” when ready to proceed.

The next screen to display is where the software will be installed. The first screen offers to install program in the default location, on the “C” hard drive of the local computer, in the “Program File”, in a Folder named “RollCall-Pro” (C:\Program Files\RollCall-Pro\). If this location is satisfactory, Press “Next” and proceed. If you want the program installed elsewhere, click on the “Change” button and see the following screen.

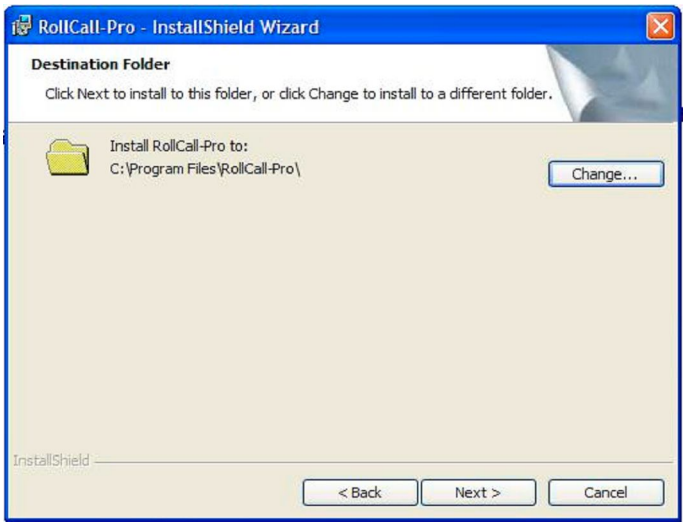


Figure 1-6. Choose the Default Destination Directory

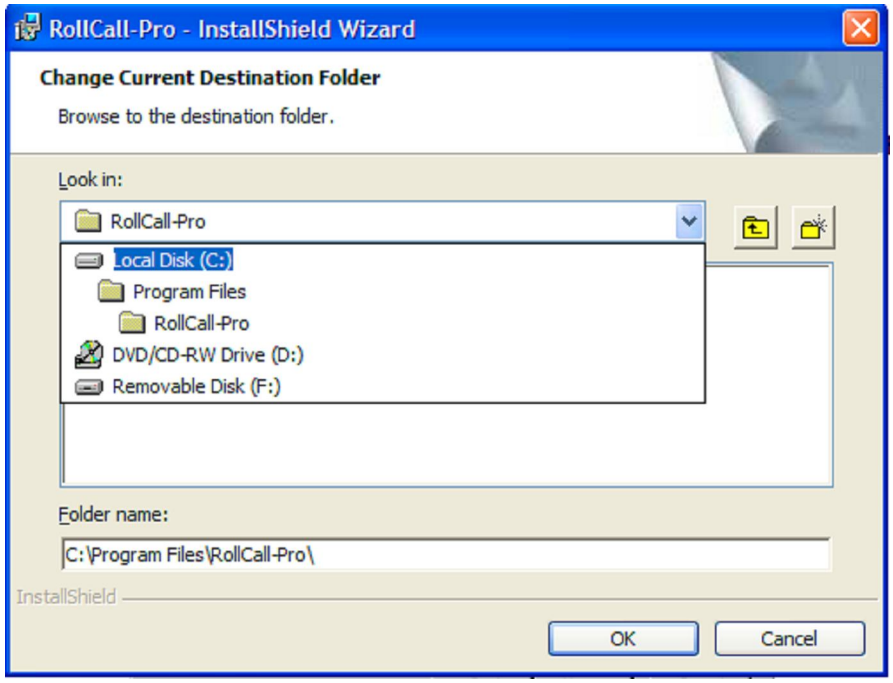


Figure 1-7. Define a Custom Destination Directory

9. It is recommended that you use the default directory. If you wish to change this default directory, you may do so by clicking on the "Change" button and choosing a new destination directory.

   Also, note that the network installation will probably be "C:\Program Files\RollCall-Pro\" as well, but when connecting via a local computer, the network drive will probably be "mapped" and a shortcut to the application should be created with the mapped network drive name.

10. Once you have either chosen a new directory or left the recommended directory alone, click on the "Next" button.

The next screen that displays is the Start Copying Files Screen that allows you to simply verify that the information you have given so far is correct.

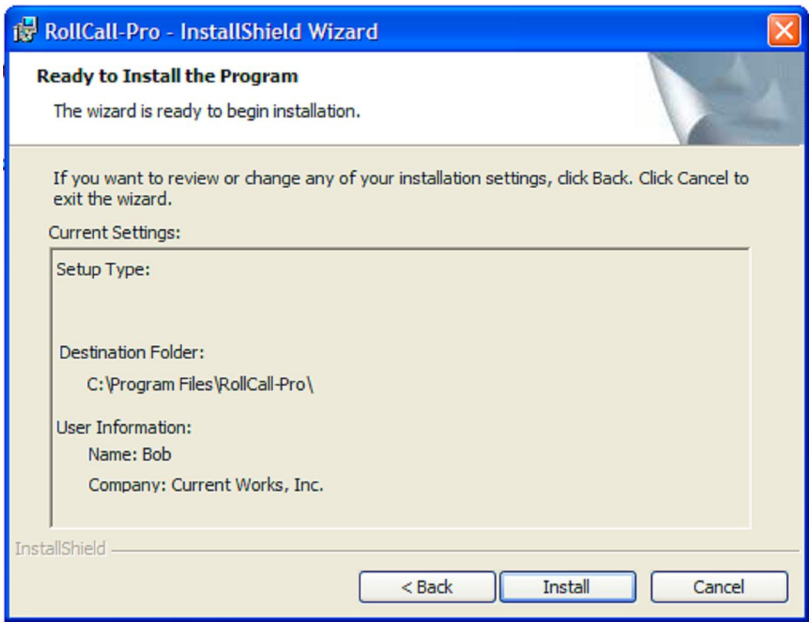


Figure 1-8. Start Copying Files

11. If everything is correct, click on the "Install" button. If anything is incorrect, click "<Back" to correct the information before proceeding.

This is the last point where the program asks for information for the installation. From this point forward, the RollCall-Pro System installation will start and copy files to your computer.

When the installation process is complete, the Setup Complete Screen displays.

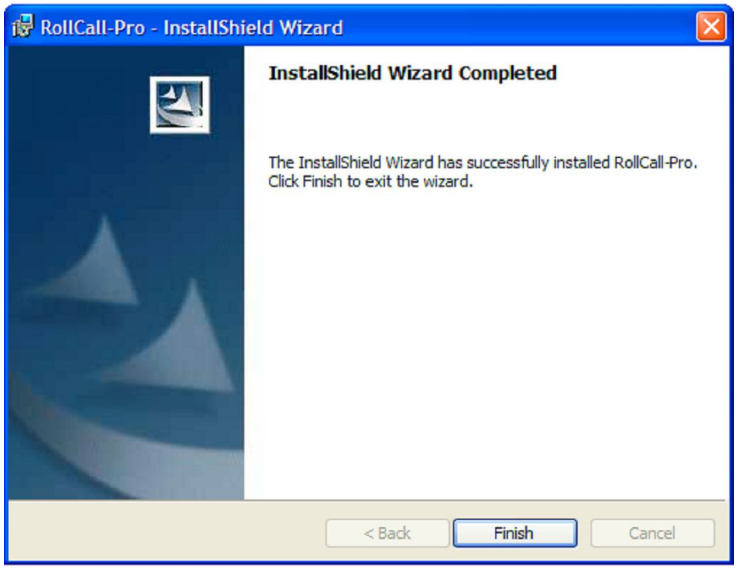

RollCall-Pro - InstallShield Wizard
InstallShield Wizard Completed
The InstallShield Wizard has successfully installed RollCall-Pro. Click Finish to exit the wizard.
< Back
Finish
Cancel

Figure 1-9. Setup Complete

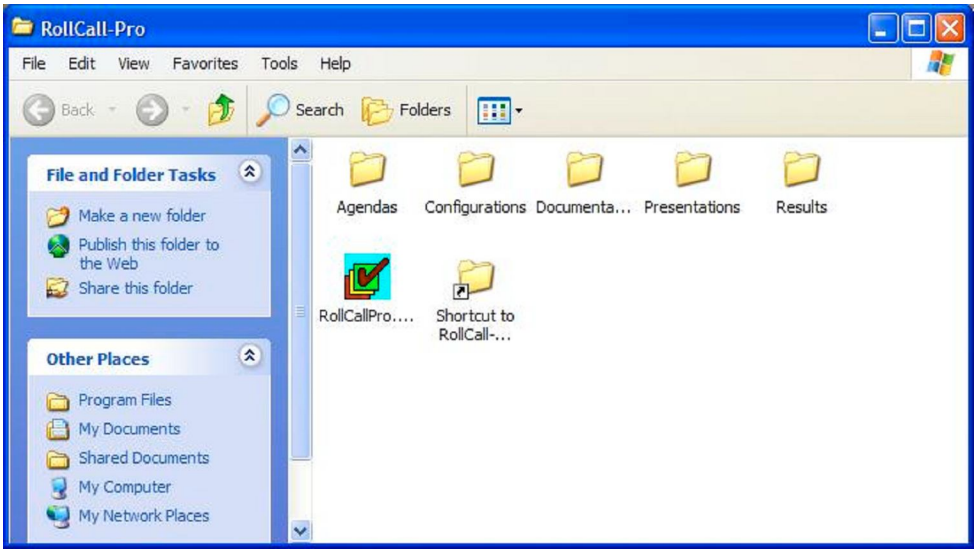
12. The RollCall-Pro software installation is now complete and all that remains to do is to click on the "Finish" button.

Once the setup screens are gone, you will notice two icons on your desktop. One is a colorful Icon named "Shortcut to RollCall-Pro".

This icon is linked directly to the RollCall-Pro software application. When you want to start up the RollCall-Pro software program, simply *double-click* on this icon.

The other icon provides a shortcut to the Roll Call-Pro Folders where the Results Folder is located.

The Results documents are saved in the folder named "Results" and they are named by the meeting date.



1.3 System Hardware

The hardware needed to complete the system includes the wireless SideKeys Keypads and the USB SideKeys RollCall-Pro Receiver-4.

To connect the receiver, simply plug the USB SideKeys Receiver-4 into a USB port on the computer. Ensure that the USB cable is securely plugged into both the USB port on the computer as well as the USB SideKeys Receiver-4. The first time this connection is made the computer will need to locate and assign the proper USB Drivers to the Receiver. This step could take from 5 to 30 seconds; be patient and wait for the red light to light-up on the face of the Receiver. Additional information on the SideKeys wireless keypad system is available in the SideKeys User Manual included with the system.

Note also that if you have installed the software onto a network server, the USB SideKeys Receiver-4 hardware must be connected to the local computer, not the network server computer.

Figure 1-10. Systems Hardware (Keypads and Receiver)

1.4 Typical Installation

The following diagram and picture give the user an idea on how to setup the system to work in a City Council Chamber, County Commissioners Room, or any room where the system may be used. Possible scenarios are TV monitors hanging in the corners of a room, a projected display on a white wall or drop down screen, or a number of other display possibilities. The projection device can either be a portable system or a permanent hanging projector from a ceiling.

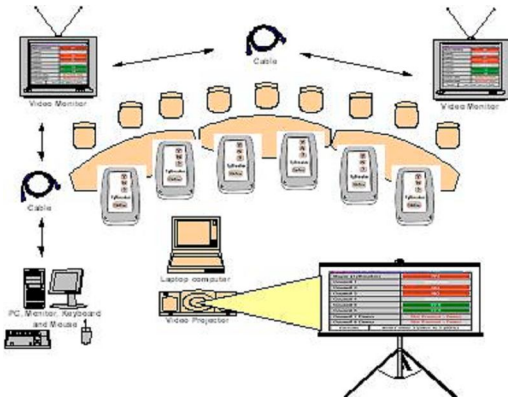


Figure 1-11. Typical Hardware Setup Diagram

Figure 1-12. Typical Installation Photo

2. Starting RollCall-Pro System

Once the RCP software is loaded and configured properly and the SideKeys hardware is installed, the full RollCall-Pro system is ready to operate.

1. Double-click on the Launch RollCall-Pro icon that is on your computer desktop.

The first screen you will see is the Startup window,

Figure 2-1. Starting RollCall-Pro System

2. Click on "Start" to open the application.

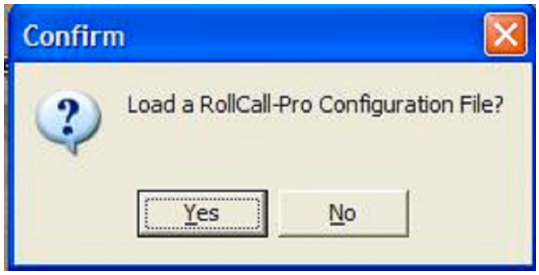


Figure 2-4. Confirm Screen asking if you have a Configuration you want to load

The application needs to know if you have already created a configuration for the Council/Board that will be using the RollCall-Pro system. If you have such a configuration already saved and you wish to use it now, simply click "Yes" and skip to the next Section: Configuring RollCall-Pro System. If you do not have a configuration saved, click the "No" button and continue to Step #3 below.

3. If you click “No”, you will be asked to select the Default Settings as a starting point. .

Figure 2-5. Select Default Settings

4. The RollCall-Pro screen for a Board of the Mayor and a nine other members will appear.

Figure 2-6. Default Settings Screen

5. To change this Default Settings Screen to your own Saved Configuration you begin with a Right Click anywhere on this Default Screen. A small pop-up window appears with a few options. Select the “Hide/Unhide Tabs” option.

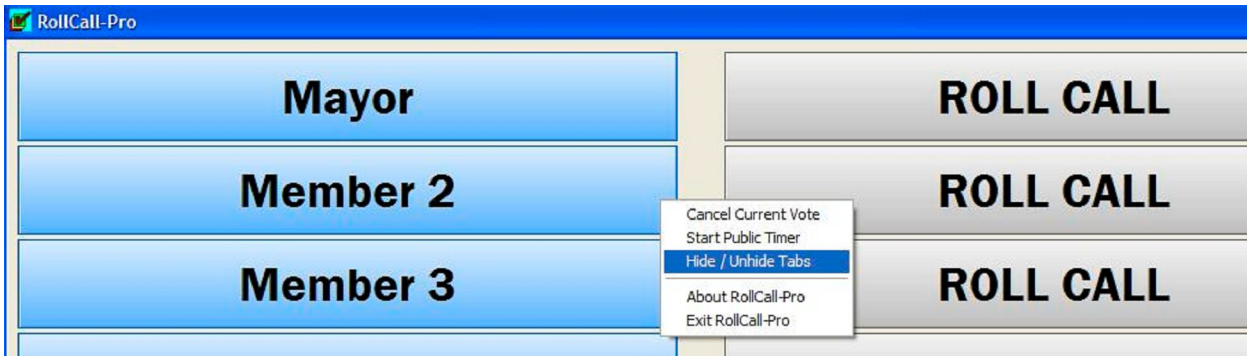


Figure 2-7. Pop-up Choice: Hide/Unhide Tabs

6. The Function Tabs on the right side of the screen will appear, see Figure 2-8 below.

Figure 2-8. RollCall-Pro Display Screen

7. To create a custom configuration for your Board/Council click on the "Setup" tab along the right side of the screen to begin this configuration process.

8. On this Setup page you will find a few pieces of basic information are required for the initial Setup.

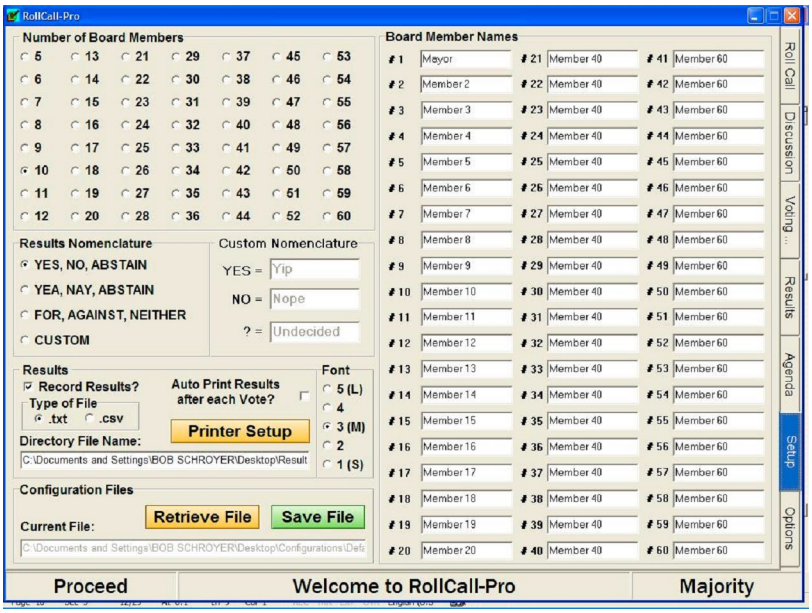


Figure 2-9. RollCall-Pro Setup Screen

9. The first step is to select how many voting members will be active in this Board/Council.

   Click the radial button next to the number in the top left corner of this screen. The minimum number of members is five and the maximum is 60. The default configuration was set at ten.

10. Next type in the names of each member of the Board/Council in the appropriate fields on the right hand side of this screen. In some cases it is easier to enter these names according to their District numbers, than in alphabetical order, but they can be entered in any order you like.

    The one exception to this flexibility is if the Mayor or Chair or President only votes in the case of a tie vote; that "tie-breaker" person must be put in the #1 position. This is the only position that can be customized to vote in the case of a tie.

11. At this point you can save this initial configuration by clicking on the green "Save File" button on this page. You should name this file appropriately, e.g. "City Council 2007" or "County Board 10/2007"

    Note that if you are running the program from a network server, you have the choice of saving the configuration file either on the local PC (usually the "C:\" drive), or the network mapped drive. The configuration file as well as the results file probably should be saved on the network drive for easy access and retrieval at a later date from any location in the network.

12. To see the screen view of your custom configuration, click on the "Roll Call" tab at the top right side of the screen. You will now see your Board/Council Members' names displayed on the screen. You can decide if you want to increase or decrease the font size of the Members' names, based on how the screen looks. These changes and other customizing capabilities are discussed in the next Section of this Manual.

3. Setting Custom Configurations

In Section 2, titled "Starting RollCall-Pro System", it was assumed that the user was starting the application for the first time. After you have successfully saved a custom configuration file, when the Confirm screen asks if you wish to load a custom Configuration File you can choose your own customized configuration file.

The following screen appears after you start the RollCall-Pro software program.

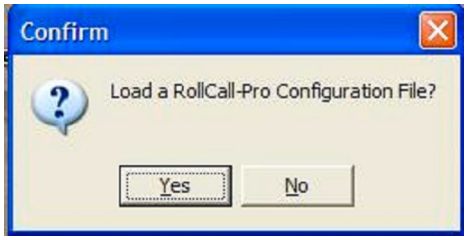


Figure 3-1. Load a Custom RollCall-Pro Configuration File.

If you click on "Yes" you will open the window to select the Configuration you want to use. See Figure 3-2.

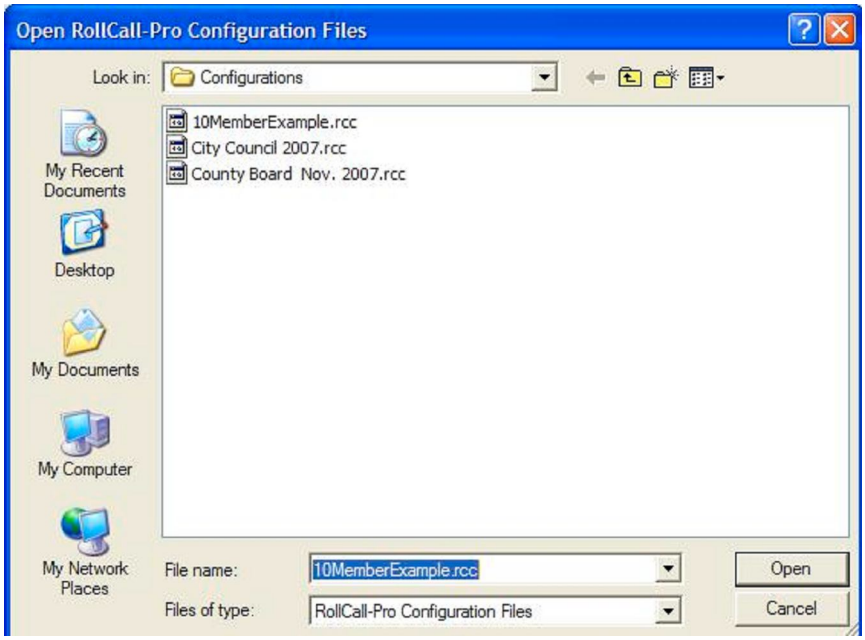


Figure 3-2. Select the Configuration File to use.

The chosen Configuration File will be displayed as it was saved the last time it was used.

Figure 3-3. Display Screen of Saved RollCall-Pro Configuration

3.1 Setup Configurations

This section will go into the details on what can be changed in the Setup Configuration.

The Configuration Setup options are reached by *right-clicking* anywhere on the RollCall-Pro Display Screen, selecting the "Hide/Unhide Tabs" and then clicking on the Setup Tab on the right side of screen. The following Setup screen appears and offers several options for customizing your configuration.

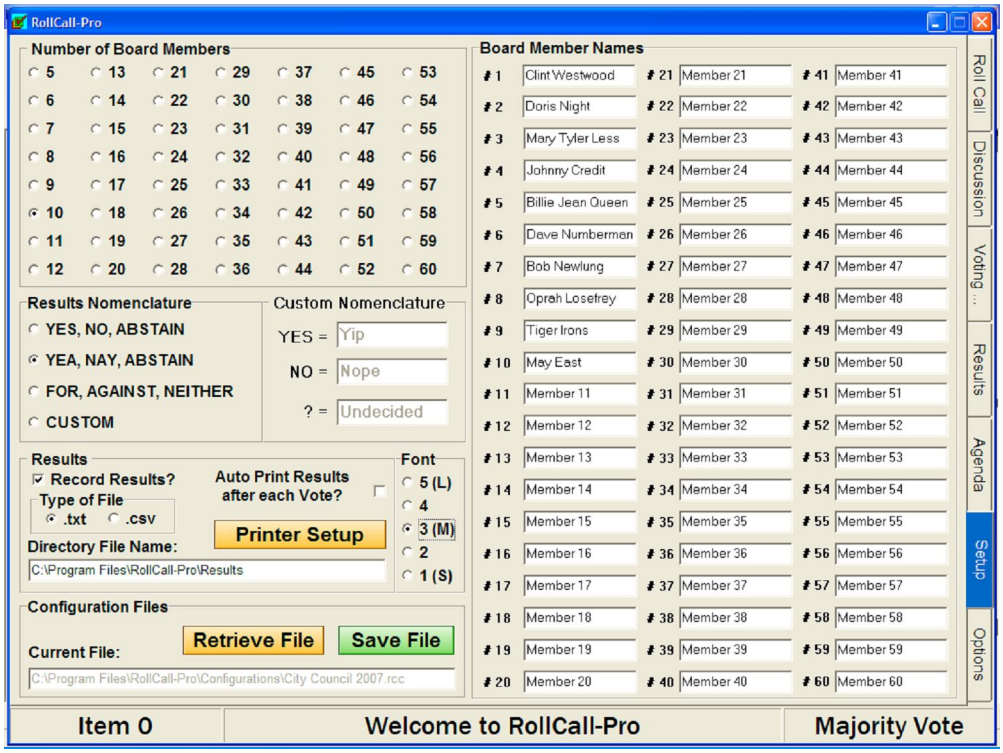


Figure 3-4. Configuration Setup Screen

3.1.1 Number of Members

This is the Number of Board Member panels that you wish to display on the RollCall-Pro Display Screen. Select the number of members to display on the screen by clicking the radial button next to the number.

Figure 3-5. Set the Number of Board Members in this Configuration

3.1.2 Name Assignments

The most important part of the customization is the Name Assignments section. This section "assigns" names to the display panels on the Voting screen. This is accomplished by replacing "Member X" with the name of one of your Board Members. It can be useful to number the Voting Members, perhaps by District # represented or by seating position, to clarify which voting keypad is assigned to which member. For example: Keypad #3 will always buzz-in to register votes for Member 3.

Special Note: If the Mayor or Chair or President only votes in the case of a tie, they must always be assigned to Keypad #1, regardless of which District he/she represents.

You can enter Voting Members' names by clicking on the Member # box and typing the name in place of the "Member #". You can move to the next box with the keyboard "Tab" key.

3.1.3 Nomenclature

The nomenclature section allows you to customize the wording of your voting. Some Boards like to use YES-NO-ABSTAIN, where others like YEA-NAY-ABSTAIN. If you would like to make up your own custom terms, then select Custom Nomenclature and type in the text you would like to see on your RollCall-Pro Display Screen.

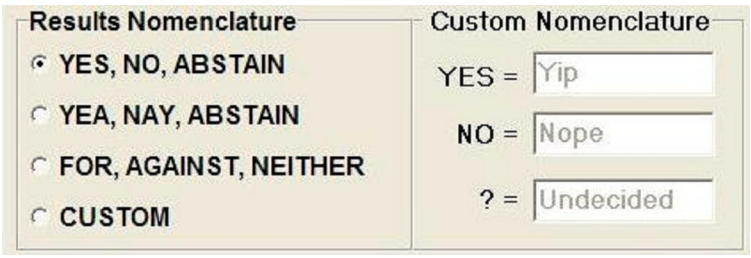


Figure 3-6 Choose Nomenclature to be Used

3.1.4 Results

This section allows you to choose whether to save the voting results, what format they should be saved in (text or comma delimited data) and where they should be saved. The defaults are to save them as a text file in the Results folder in the RollCall-Pro Folder (the RollCall-Pro Installation process provides a Shortcut on your desktop to this Folder).

Note: If you wish to save the Results somewhere different than in the RollCall-Pro folder, like on the Network Server, you must specify the location path to where you want the Results saved. This is done in the **Directory File Name** *field on this screen.*

You can also choose to have a copy of the RollCall-Pro voting results display screen automatically printed at the conclusion of each vote. This provides a paper record of the voting Results. This would be of value if anything happened to the computer during the meeting. This option requires that a printer be connected to the computer during the meeting.

If you choose to "Auto Print" the voting results of each vote taken, you can also set the "Printer Setup" by clicking on this yellow button, for the printer assigned to this computer. The details that can be set depend on the printer and related drivers that you have.

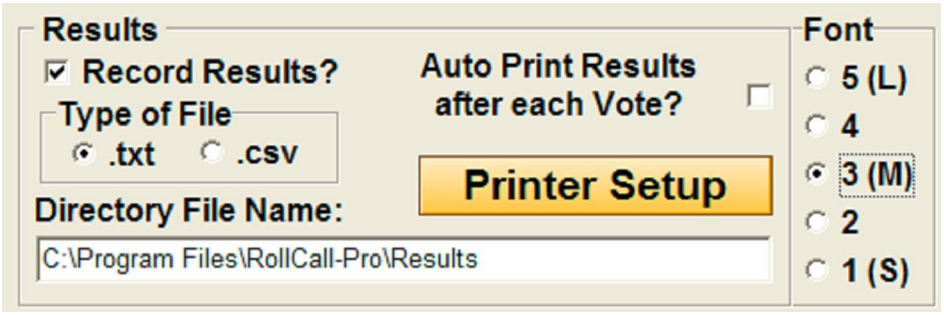


Figure 3-7. Save Results

3.1.5 Font Size

This section allows you to adjust the size of the text (Font) that appears on the screen. Depending on the lengths of the Members' names and titles, you can increase or decrease the font size accordingly. You can try different font sizes along with variations in how to write names (District # and member's name, full proper names, first initial & last name, last name only, etc.) to get the best public display of members' names.

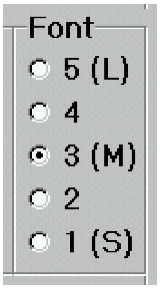


Figure 3-8. Adjust Font Size

3.1.6 Save Custom Configuration

This section allows you to retrieve a previously saved RollCall-Pro Setup (configuration) or to save a newly created or revised configuration. To save a new custom RollCall-Pro Configuration file, click on the "Save" button. To retrieve a custom RollCall-Pro Configuration file, click on the "Retrieve" button. See Figure 3-9 for the Save dialog for this feature. You can save as many unique RollCall-Pro Configuration Files as you like in the RollCall-Pro folder.

Figure 3-9. Retrieve or Save new Configurations

Note: Again, if you want to save the RollCall-Pro software program and related configurations on the network server, you must specify the file location path to the RollCall-Pro folder and the Configuration folder on the Server.

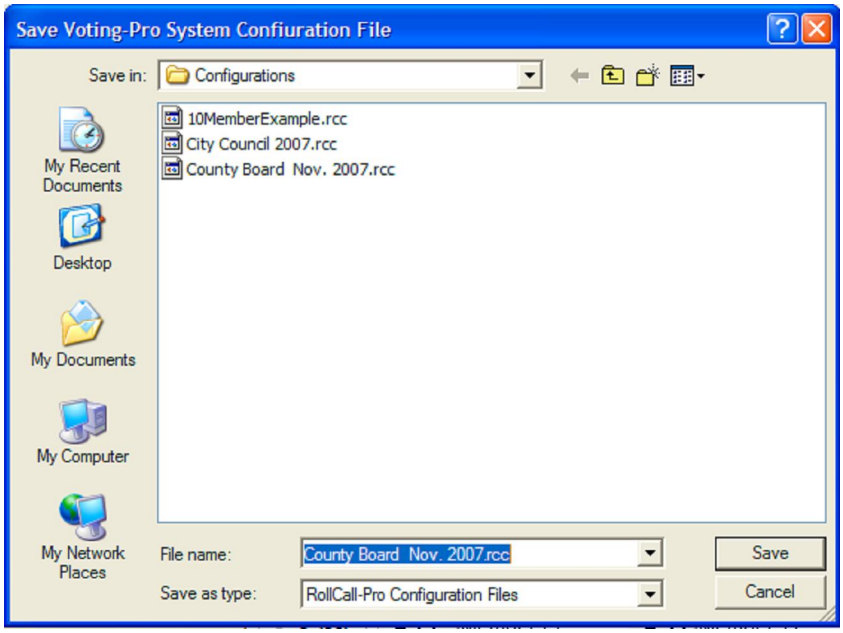


Figure 3-10. Save or Retrieve a Custom RollCall-Pro Configuration File

3.2 *Business Rules*

The Business Rules for the RollCall-Pro System specify the operating "Rules of Order" that you use to conduct business and legally "Vote" on decisions. The areas that can be changed in these rules include:

Rules for the first Voting Position

Initial Voting Criteria

Rules for Minimum Voters (Quorum)

Activation of the "Request to Speak" Function

Activation of the "Present / Not Present" Function

Activation of counting "Abstain Votes toward the Majority" Function

Activation of "Displaying the Votes when the Last Voter Votes" Function

Business Rules are once again accessed via the Tabs on the right side of the display screen, this time selecting "**Options**" Tab for the "Business Rules". These Business Rules will be covered in depth in this section.

If the Tabs on the right side of the display screen are not visible, *Right Mouse-Click* anywhere on the screen to access the popup menu. Select the "Hide/Unhide Tabs" and the Function Tabs will appear along the right side of the screen.

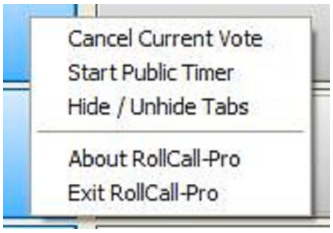


Figure 3-15. Right-click anywhere on RollCall-Pro Display Screen & get pop-up choices

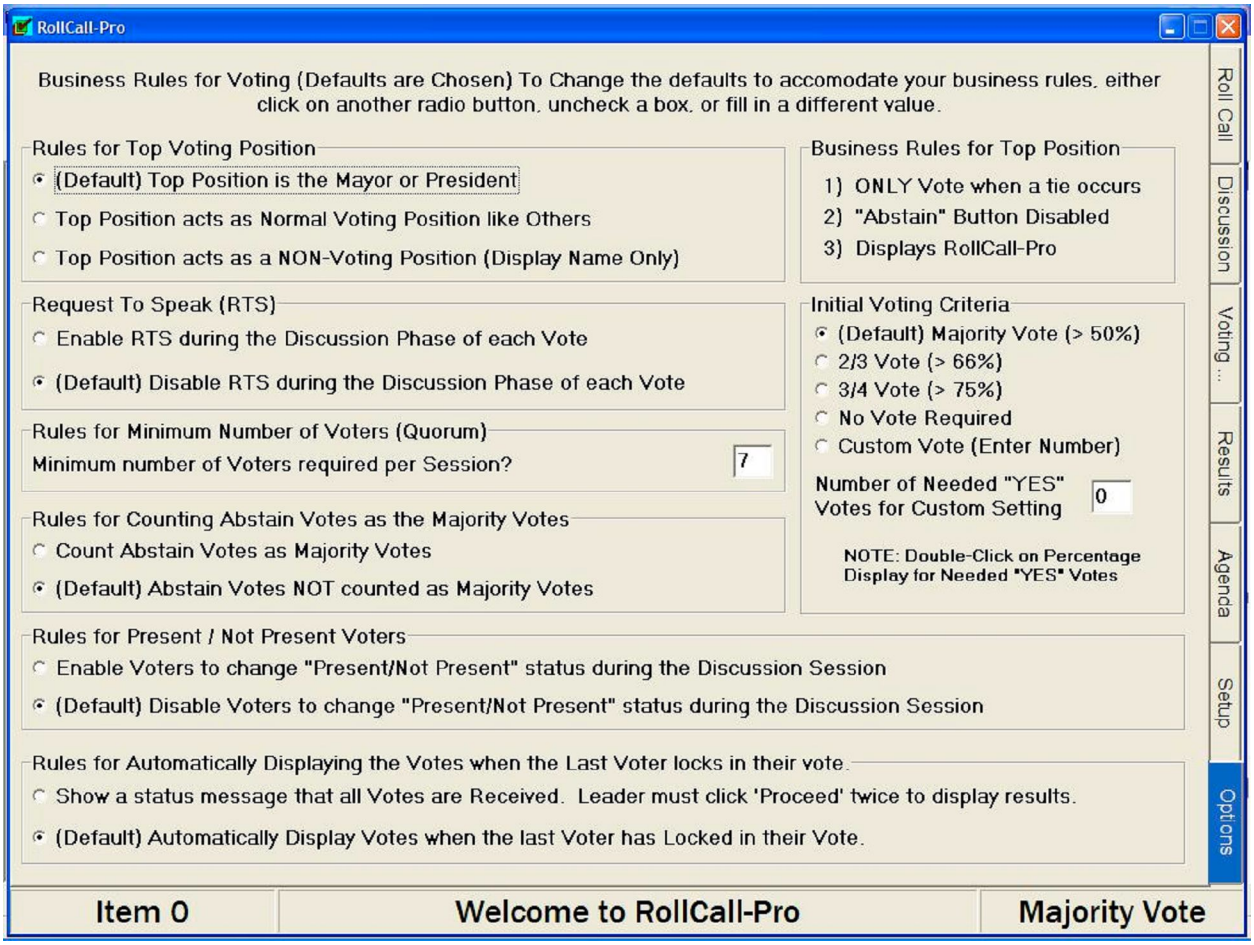

RollCall-Pro
Business Rules for Voting (Defaults are Chosen) To Change the defaults to accomodate your business rules, either click on another radio button, uncheck a box, or fill in a different value.
Rules for Top Voting Position
(Default) Top Position is the Mayor or President
Top Position acts as Normal Voting Position like Others
Top Position acts as a NON-Voting Position (Display Name Only)
Business Rules for Top Position
1) ONLY Vote when a tie occurs
2) "Abstain" Button Disabled
3) Displays RollCall-Pro
Request To Speak (RTS)
Enable RTS during the Discussion Phase of each Vote
(Default) Disable RTS during the Discussion Phase of each Vote
Initial Voting Criteria
(Default) Majority Vote (> 50%)
2/3 Vote (> 66%)
3/4 Vote (> 75%)
No Vote Required
Custom Vote (Enter Number)
Rules for Minimum Number of Voters (Quorum)
Minimum number of Voters required per Session?
7
Number of Needed "YES" Votes for Custom Setting
0
Rules for Counting Abstain Votes as the Majority Votes
Count Abstain Votes as Majority Votes
(Default) Abstain Votes NOT counted as Majority Votes
NOTE: Double-Click on Percentage Display for Needed "YES" Votes
Rules for Present / Not Present Voters
Enable Voters to change "Present/Not Present" status during the Discussion Session
(Default) Disable Voters to change "Present/Not Present" status during the Discussion Session
Rules for Automatically Displaying the Votes when the Last Voter locks in their vote.
Show a status message that all Votes are Received. Leader must click 'Proceed' twice to display results.
(Default) Automatically Display Votes when the last Voter has Locked in their Vote.
Roll Call
Discussion
Voting ...
Results
Agenda
Setup
Options
Item 0
Welcome to RollCall-Pro
Majority Vote

Figure 3-11. Business Rules Screen

3.2.1 First Voting Position

The Business Rules for "First Voting Position " are simply the rules that apply to the first name in the left hand column on the main display. This Member #1 position must be assigned to the Mayor, Chair or President, if they only vote in the case of a tie vote.

This position can hold one of three roles: 1) the official "Tie-Breaker" or 2) have the same Voting responsibility as every other member or 3) serve as a Non-Voting Member.

The default setting for this First Position is as the Tie-Breaker Position. This means that the position 1) only votes when a tie occurs, 2) cannot "Abstain", and 3) the voting display for the is "Not Required", unless there is a Tie Vote. This position is typically filled by the Mayor, Chairman or President of the Board.

The second choice for this position is acting as a "Normal" voter and voting along with everyone else on the issues. This position will NOT break ties. If a tie vote does occur, the display will simply show the vote as a tie. The Board would use its own Rules of Order to decide how the tie vote is resolved.

The last choice in this section is to display the name of the person in charge but not to give them any voting rights at all. For example, a City has a Mayor that is not allowed to vote on issues, but regularly

sits with the rest of the council members. In this case, the Mayor's name would be displayed, he/she would be recognized for speaking on issues if the "Request to Speak" function is enabled, but not allowed to vote on any items.

Rules for Top Voting Position
(Default) Top Position is the Mayor or President
Top Position acts as Normal Voting Position like Others
Top Position acts as a NON-Voting Position (Display Name Only)
Business Rules for Top Position
1) ONLY Vote when a tie occurs
2) "Abstain" Button Disabled
3) Displays RollCall-Pro

Figure 3-12. Define the Role of the Position

3.2.2 Initial Voting Criteria

This Business Rule allows the user to select what voting criteria will be displayed as the initial default on the Voting Screen. Choices are:

Maj Vote (Majority of Voting Members Present -- Greater than 50%);
2/3 Vote (Greater than or equal to 66% of Voting Members Present);
3/4 Vote (Greater than or equal to 75% of Voting Members Present);
No Vote Required (No vote will be taken on this issue, will proceed to next Agenda Item); or
Custom Vote (Actual Number of **"Yes" Votes** required to Pass, regardless of how many Voting Members are Present) you must specify this number, if you wish to use this function.

The actual criteria for each item on the Agenda can be set in the Agenda Setup, if desired. Such settings will override this Initial Setting.
The actual criteria for each vote can also be adjusted on screen, during the Discussion of the issue, before the vote is cast.
In this section of the Business Rules, you prescribe which criteria will be displayed initially when the RollCall-Pro Display Screen first starts up, unless you have specified in the Agenda what the criteria will be each item under consideration.

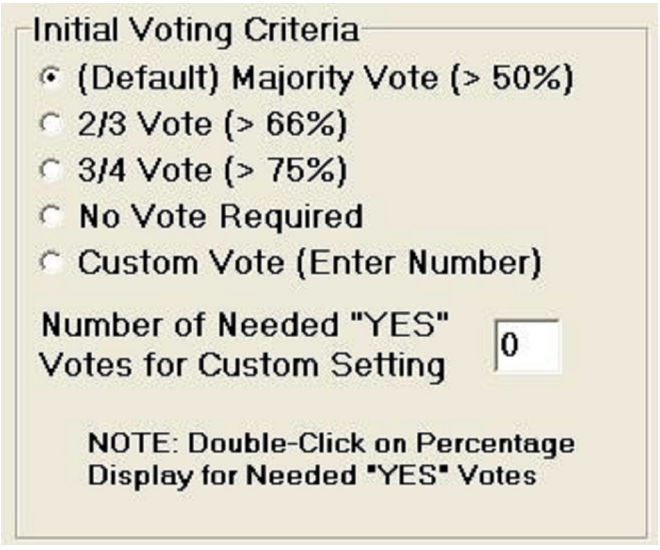

Initial Voting Criteria
(Default) Majority Vote (> 50%)
2/3 Vote (> 66%)
3/4 Vote (> 75%)
No Vote Required
Custom Vote (Enter Number)
Number of Needed "YES" Votes for Custom Setting
0
NOTE: Double-Click on Percentage Display for Needed "YES" Votes

Figure 3-13. Set the Voting Criteria Default

3.2.3 Minimum Number of Voters

This function allows the user to choose a minimum number of voters (Quorum) that must be present in order for the session to go forward. If this number of Members does not buzz-in to the initial Roll Call, the Voting System will not proceed. A notice will appear in the bottom center of the RollCall-Pro Display Screen indicating an insufficient number of Voters is Present to conduct official business. Likewise, if the number of Members "Present" in the meeting falls below this Quorum during the course of the meeting, the system will not allow a Roll Call Vote.

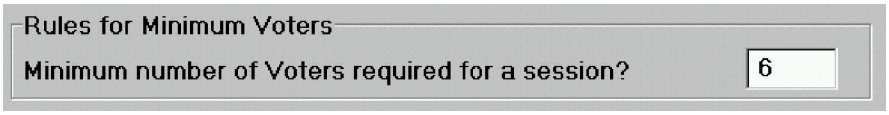


Figure 3-14. Set the Minimum # Members Present for the Meeting

3.2.4 Request to Speak (RTS)

The "Request to Speak" function allows the Members to buzz-in during the Discussion phase of the meeting to speak about the Item before the vote is taken. The Members simply push the "RTS" button on their keypads and their intent to Speak is displayed on the Voting screen. They are instantly placed into the queue of speakers in the order of their request. This section allows the user to enable this function. The default is to have this function Disabled. Additional details about the use of this function are explained in the Operator's Manual.

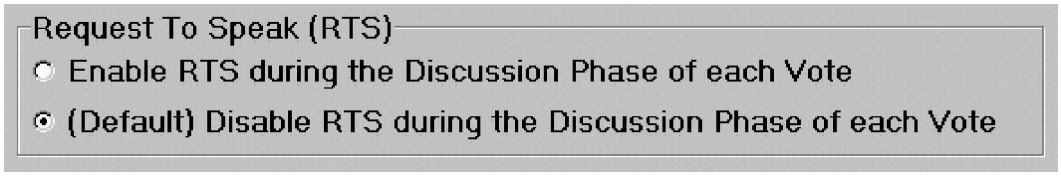

Request To Speak (RTS)
Enable RTS during the Discussion Phase of each Vote
(Default) Disable RTS during the Discussion Phase of each Vote

Figure 3-15. Enable the Members to use the "Request to Speak" Function

3.2.5 Present or Absent Members

This function allows the members to enter during the Discussion phase of the meeting, and make themselves "Present" by pushing the Yes (Present) button on their keypad. Likewise, if they need to leave the meeting they can push the No (Absent) button on their keypad to make themselves "Absent" when they leave. The default is to have this function Disabled. Additional details about the use of this function are explained in the Operator's Manual.

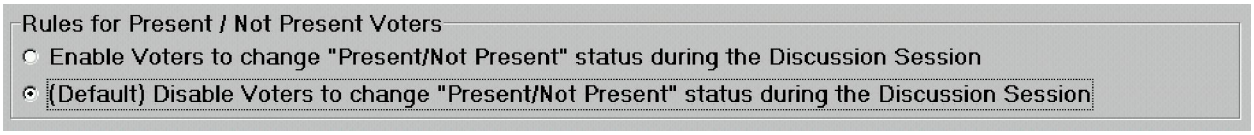

Rules for Present / Not Present Voters
Enable Voters to change "Present/Not Present" status during the Discussion Session
(Default) Disable Voters to change "Present/Not Present" status during the Discussion Session

Figure 3-16. Enable the Present/Not Present Function

Note: Even if this "Present/Absent" function is disabled, the Clerk/Leader can still change the Present/Absent status of any Member during any stage of the meeting by double clicking the mouse on the member's name on the screen. See the Operator's Manual for details.

3.2.6 Counting Abstain Votes

The default position for this business rule is NOT to count abstain votes toward the majority and simply display and count the votes as they are cast. One option in Robert's Rules of Order is to allow the abstain votes to count toward the majority. This means that possibly in a 2/3 vote, under normal (default) conditions, the majority may not have enough votes to pass, but if there were significant voters that were abstaining on the vote, their votes may then count toward the majority and could swing enough votes to win the 2/3 vote needed. More on this topic can be found in the Operator's Manual.

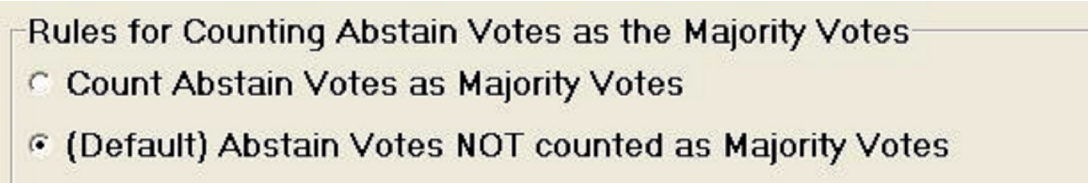

Rules for Counting Abstain Votes as the Majority Votes
Count Abstain Votes as Majority Votes
(Default) Abstain Votes NOT counted as Majority Votes

Figure 3-17. Specify How Abstain Votes Are Counted

3.2.7 Displaying Voting Results

Typically, when the last voter has confirmed his vote choice, the voting results are publicly displayed, unless there is a tie, and then the #1 Position Member must vote to break the tie, before the Voting Results are displayed. The default for this business rule is to display the votes when the last Confirmed voter has locked in his or her vote.

Alternatively, you may opt to let the Leader choose when to display the results. In this case, select the first button and then a status message at the bottom of the screen will display when the last voter has confirmed his or her vote. The Leader must then click on "Proceed" to display the results.

This also allows one last opportunity to let any Member change their vote, before the final voting results are displayed. If, for some reason, a Member is not sure how they voted and fears that their vote might be wrongly registered, they can have their vote reset, by the Leader, before disclosure, and recast their vote.

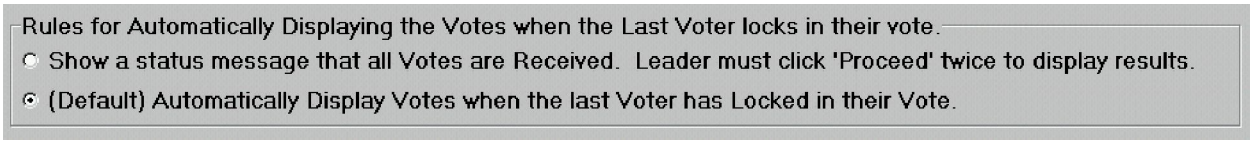

Rules for Automatically Displaying the Votes when the Last Voter locks in their vote.
Show a status message that all Votes are Received. Leader must click 'Proceed' twice to display results.
(Default) Automatically Display Votes when the last Voter has Locked in their Vote.

Figure 3-18. Specify When to Display Voting Results

3.2.8 Save Changes

When you have finished setting the Business Rules for the meeting, you must click on another Tab to leave this page. When you do, you will be asked if you want to Save your Business Rules in the Configuration File before proceeding. If you choose not to Save your changes, they will be active during this session, but will not be active the next time this Configuration is used.

Figure 3-19. Save Business Rules

4. Additional Menu Items

When you "*right mouse-click*" on the RollCall-Pro screen, you get a popup window of several options. So far we have discussed the " **Hide/Unhide Tabs**" function. In this Section we will discuss the other four functions that are also available in this popup window. We will also explain how to load Agenda Items into the program, prior to the meeting.

4.1 About RollCall-Pro

The "About RollCall-Pro" screen is also available from the "*right mouse-click*" anywhere on the RollCall-Pro Display Screen. This window provides additional information about the installed version of RollCall-Pro System that you have.

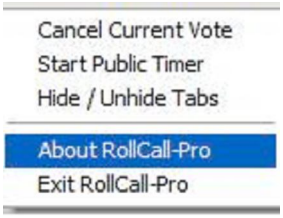


Figure 4-1. Accessing About RollCall-Pro

The following figure shows the RollCall-Pro System "About RollCall-Pro Box".

About RollCall-Pro
Roll Call-Pro)))
The Wireless System
RollCall-Pro
Version 2.04
Copyright 2007
RollCall-Pro was developed by Current Works, Inc.
Help for RollCall-Pro can be found in the User's Manual located on the RollCall-Pro CD or in the installation directory labeled Documentation.
The latest version of the software can be found on the RollCall-Pro website: www.rollcallpro.com
Close

Figure 4-2. About RollCall-Pro Box for Version 2.04

4.2 Cancel the Current Vote

The "Cancel Current Vote" screen is also available from the "*right mouse-click*" anywhere on the RollCall-Pro Display Screen.

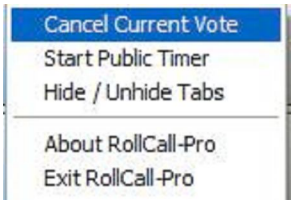


Figure 4-3. Cancel Current Vote

To cancel the current vote in the middle of a voting session, Click on the Right Mouse button, and the menu in Figure 4.3 will appear. Left Click on the "Cancel Current Vote" menu item, and then the system will ask you to confirm your cancellation and then press the "Proceed" or "Vote" button on the Leader/Clerk's keypad to return you to the Discussion of the item.

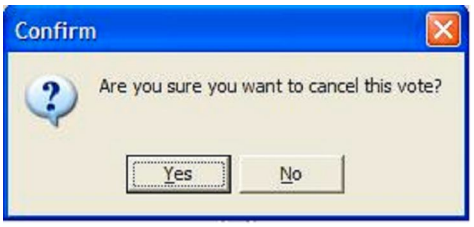


Figure 4-4. Are you sure?

Figure 4-5. Press Proceed

For example, if you are voting on "Item 5", and after the voting has started, but not been completed, you wish to cancel the vote for any reason. Then you simply need to right click on the screen and select "Cancel Current Vote" menu item and follow the onscreen windows. After you click the "OK" button on the second popup screen, the Leader needs to push the "Proceed" button on the Leader's keypad (or hit "z" on the computer keyboard) and the voting session will return to the Discussion of "Item 5".

4.3 Start the Public Timer

This function is always available to the Leader by right clicking on the Display Screen and choosing the "Start Public Timer" function on the popup window.

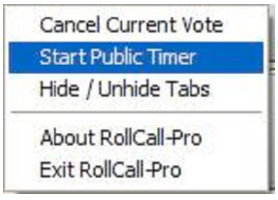


Figure 4-6. Public Timer

This function is intended to provide a visual timer to manage the time limit on public input from individuals to the Board. It can be used at any time, when the Board wishes to set a time limit on a speaker. Time limits can be set from 1 to 15 minutes.

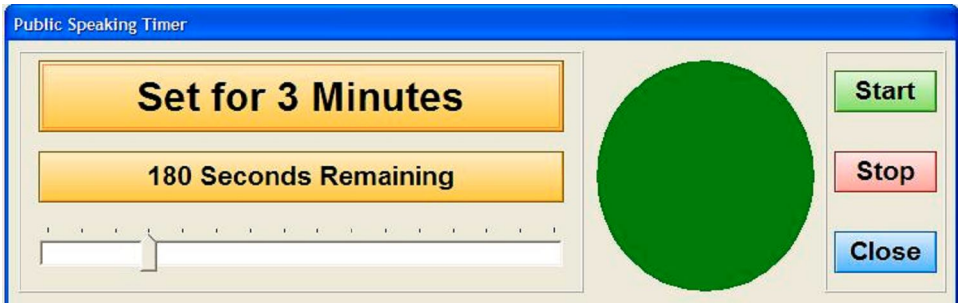


Figure 4-7. Public Timer Clock

Further description of this function is provided in the **Operator's Manual**.

4.4 Enter Agenda Items

You can enter a complete list of Agenda Items into the RollCall-Pro system, before the meeting starts. The "Short Description" will appear at the bottom of the Discussion and Voting screens, in place of the "Item Number". The "Voting Criteria" for the Item to pass (including an option for "No Vote Required" if appropriate) will also appear at the bottom of the Discussion and Voting screens. The Full Description of the Item can also be entered on the Agenda page for each Item. This can be viewed in the meeting by clicking on the Agenda Tab. Additional Agenda Items, like proposed amendments to a resolution, can also be added during the meeting (Insert Agenda Item). Items can also be revised or deleted during the meeting, like if the original Resolution is amended during the meeting.

More details on using the Agenda Function during the meeting is provided in the Operator's Manual.

Click on the Tab "Agenda" on the right side of the screen.

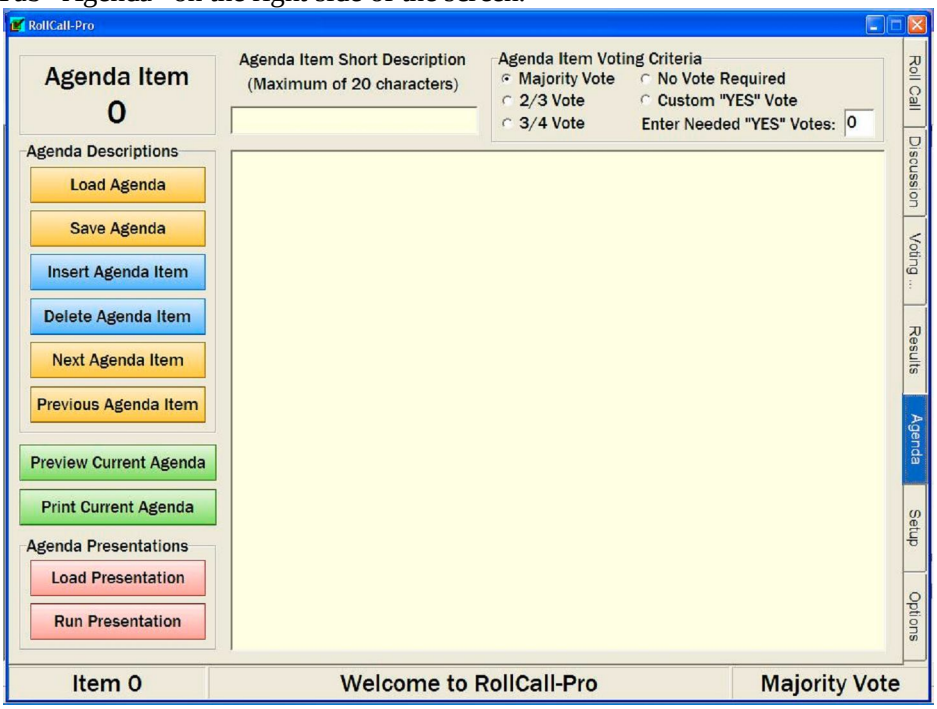


Figure 4-8. Agenda Screen

To enter a new Agenda, start by Loading an existing Agenda, initially you can use the “Sample Agenda”.

Figure 4-9. Load Agenda Selection Screen

The contents for each Agenda Item can be typed directly or cut and pasted from another document.

At a minimum you must enter 1) the Short Description of the Agenda Item and 2) the Voting Criteria at the top of this page. This description the Voting Criteria will appear in the fields at the bottom of the screen during the Discussion and the Voting of this Item. This information will also be used to record the Discussion info and the Voting Results in the Results document.

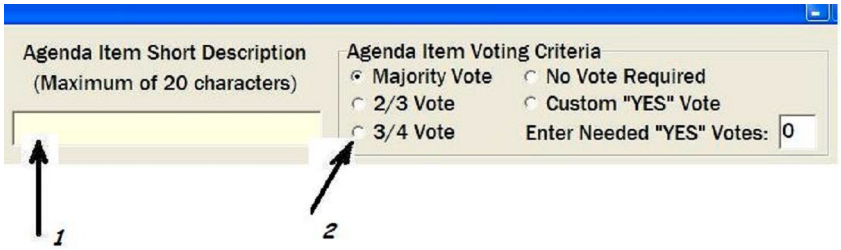


Figure 4-10. Agenda Short Description and Voting Criteria Settings

The Description can only be a maximum of 20 characters in length. The Voting Criteria can be one of five options. The most common criteria for deciding if an Item passes is the “Majority Vote”. In this case if more than 50% of the members present and voting say Yes on the Item, it passes. The 2/3 and ¾ Voting criteria require that at least 2/3 or ¾ of the members present and voting say Yes on the Item for it to pass. If “No Vote Required” is the selected criteria, when the Discussion of the Item is completed, the Agenda will move directly to the next Item, without a vote taking place. If the vote on an Item requires some minimal number of Yes votes to pass, no matter how many members are present and voting (e.g. the Item requires 2/3 of the full Board to pass – 14 out of 20 Board Members), the “Custom Yes Vote” can be selected and the number 14 entered in the Yes Votes Needed box.

The full text of the Agenda Item is optional here. If you want to be able to display the details of the Item to the Board/Council Members or to the public, it can be typed or copied into this Agenda page. In this case, when the Full Agenda Item is to be displayed, the Tab to this page needs to be selected and the proper Agenda Item displayed. This can be useful when an Item has been amended in the meeting and the Board Members want to see the full finished text that they are voting on.

When the Agenda has been completed, it needs to be Saved, with an appropriate name. This final agenda can also be printed out for the record, especially if it was revised during the meeting.

5. Exit RollCall-Pro

When you are finished working with the RollCall-Pro System you can exit the program from the same pop-up "*right-mouse click*" window. This method of exiting the program provides some protections from accidental closure and from closing before Voting Results are saved.

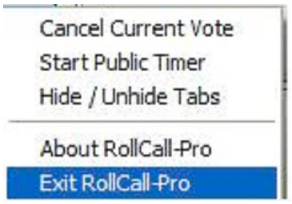


Figure 5-1. Accessing Exit RollCall-Pro

After choosing the Exit option, the next popup asks if you really want to Exit the program, just in case this was an accidental choice.

Figure 5-2. Are you sure?

Also, if there is a Roll Call voting result that has not yet been saved in the Results folder, another Popup screen will direct you to click "Proceed" to save these voting Results before exiting the program.

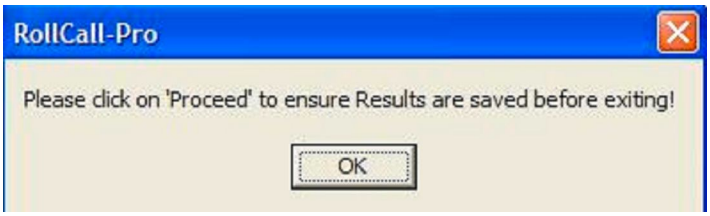


Figure 5-1. If the Last Voting Results have not been Saved, you cannot Exit.

Note: This **Installation & Setup Manual** is meant to assist in the Configuration of the System, before using it in a meeting.
The **Operator's Manual** will assist with the use of the System in a meeting.

6. Customer Service

This RollCall-Pro **Installation and Setup Manual** is intended to provide guidance to prepare your system for the meeting.

The RollCall-Pro **Operator's Manual** is intended to provide guidance in the use of this system in running the meeting.

The **SideKeys User's Manual** is intended to provide guidance in the use of the wireless keypads in this system.

If you have any need for additional assistance in the use of these tools please contact us.

Current Works, Inc.
1395 Horizon Drive
Johnsburg, IL 60051
888-526-1200
Email: **info@currentworksinc.com**
Website: **www.rollcallpro.com**

Customer Service available Monday-Friday 8:30am – 4:30pm CST